

Your Marketing Gap Audit Report

The SEND stage is your top priority right now.

Hey friend,

Out of the 8 stages of the Trail to the Sale™, the one giving you the most trouble right now is Send.

This isn't a verdict — it's a starting point. **Send is one of those neglected back-end stages, where loyalty and referrals get built.** That's why fixing this stage tends to move the needle fast. Let's start here.

What the Send Stage Actually Is

Send is the stage where your happy customers become your growth engine. Referrals. Testimonials. Reviews. Repeat business. Word of mouth that brings new people back to the top of your Trail without you spending a dime on marketing. It's the most overlooked stage — and it's where the smartest businesses make marketing feel almost easy. Because when your happy customers are doing some of the selling for you, everything else gets lighter.

Your job at this stage? Make it easy, natural, and built-in for happy customers to send other people your way.

The key question your customer is asking: *"Who else should know about this?"*

***A quick honest note:** *this is based on a short quiz, so think of it as my strongest hunch, not your final diagnosis. Use it as the place to look first.*

What It Usually Looks Like When the Send Stage Is Leaking:

Some honest signs your Send stage needs work:

- You rarely ask for testimonials, and when you do, it feels awkward.
- You know you should ask for referrals, but you never quite get around to it.
- Happy customers say nice things in private but rarely write them down or tell other people.
- Referrals happen by accident, not by design.
- You don't have a real system for turning a finished engagement into a piece of social proof.

If any of those gave you an *oh my gosh that's me* moment, that is the one to work on first.

3 Things To Do First:

These are directional next steps, not the whole solution. Just use these as the place to start in the next 30 days.

1. Build the ask into your offboarding — every single time.

Don't wait until you happen to feel brave. Make the testimonial ask a standard part of how every engagement ends. A simple follow-up email with 3 easy questions. A wrap-up call with one specific request. A short form with prompts. The system removes the awkwardness — because it's just "what we do" now.

2. Make it ridiculously easy for customers to refer you.

People want to refer good work, but they need a way to do it that doesn't feel like homework. Give them something to forward: a one-pager about your services, a link to your podcast, a specific offer they can hand off. The easier you make the referral, the more often it happens.

3. Reach back out to past happy customers.

You have a backlog. Customers who loved working with you and quietly disappeared into their own lives. Make a list of your 10 happiest past customers and reach out — a warm, no-pressure note. Catch up. Ask how things are going. Then ask if they know anyone who'd benefit from your work. Most of them will say yes — they just needed the invitation.

Where This Fits In The Bigger Picture:

The Trail to the Sale™ has 8 stages — Awareness, Consider, Compare, Evaluate, Sell, Supersize, Serve, and Send. Every stage feeds the next. Strong Send turns the END of one customer journey into the BEGINNING of the next. It's the stage that takes pressure off all your other marketing — because referrals and testimonials do half the work for you.



The Bigger Fix (when you're ready):

Send is one piece of a bigger system. If you want the full roadmap — not just for Send, but for connecting every stage of your customer's journey into one strategy that actually works — that's exactly what I built **Modern Marketing Mastery** to do.

It's an 8-week course built around the Trail to the Sale™ framework, with Module 6 covering Serve & Send — turning happy customers into your most powerful marketing asset. If this PDF resonated, that module is your roadmap.

Join the VIP List



I'm Janice — marketing strategist, fractional CMO, podcast host of *My Weekly Marketing*, and someone who's spent 30+ years figuring out how to turn scattered marketing into a clear path to more clients.

The reason I built the Trail to the Sale™? Because most marketing advice teaches tactics without context — and I watched too many smart business owners burn out doing "all the things" without a system underneath. The Trail is the system. This audit is the starting point.

If we haven't met yet, come find me on the podcast — *My Weekly Marketing* — for weekly conversations on building a marketing system that actually pulls its weight.

Talk soon!

Handwritten signature of Janice.